

GLOBAL PATIENT TEMPERATURE MANAGEMENT MARKET FORECAST 2017-2025

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Abstracts

KEY FINDINGS

Patient warming and cooling devices offer several benefits such as reducing loss of blood during surgeries, lowering the risks of neurological disorders post cardiac arrests, rapid recovery after surgeries, and decreasing risks of SSIs. The patient warming systems can be segmented into convective warming system, surface warming systems, and intravascular warming systems.

These benefits in turn reduce the stay at hospitals thus, lowering the healthcare costs by enhancing the healthcare infrastructure with the employment of patient temperature management devices. These health benefits offered by patient warming and cooling devices also help healthcare providers to lower the rate of readmissions significantly.

The Global patient temperature management market generated revenue of \$2.062 Billion in 2016 and is anticipated to contribute \$3.839 Billion by 2025, growing at a CAGR of 7.2% during the forecast period 2017-2025. The patient warming systems market accounted for a large share and is expected to witness the highest growth during the forecast period of 2017-2025. Patient temperature management systems are developed to administer and regulate patient's body temperature. The market for temperature management market is driven by the rapid rise in number of healthcare organizations adopting the temperature management system in multiple clinical applications and settings for the benefits of patient is likely to drive the market growth in future.

For Market size estimation, both Top down and bottom up methods to estimate and validate the size of the global market and the size of various other segments of the

patient temperature management market.

Source: Inkwood Research

With emerging Health organizations and Hospitals implementing patient warming devices, enormous market growth can be predicted. Some of the other reasons for the growth of patient temperature management market are rise in incidences of Nervous System and Cardiovascular Disorders, technological enhancements, development of mobile devices, Enhanced Healthcare Infrastructure and Conferences or Symposiums on Patient Temperature Management.

Temperature management solutions are used to maintain the normal body temperature for critically ill patients during surgical procedures. The patient temperature management market can be categorized on the basis of application areas such as acute care, newborn care, perioperative care, and others. The rise in number of healthcare organizations setting up standards or guidelines for the use of temperature management systems in maintaining normothermia during neurological and cardiac surgeries is likely to accelerate the growth of the market.

The patient temperature management products market can be segregated into perioperative care, acute care, newborn care, and other applications areas (military, physiotherapy, chemotherapy, and patient transport). The major share of perioperative care can be attributed to rise in demand for surgical procedures and adherence to the guidelines set by the NICE for adoption of patient warming systems in several indications.

MARKET INSIGHTS

The rise in cardiovascular disorders and the rise in healthcare organizations setting up standards for the use of temperature management are two driving factors responsible for the market growth. Also growing demand for warming systems and launching of more patient warming systems than patient cooling systems are expected to drive the market growth. Temperature management is used to prevent neurological damage after cardiac arrests. The rise in number of healthcare organizations setting up standards or guidelines for the use of temperature management systems in maintaining normothermia during neurological and cardiac surgeries is likely to accelerate the growth of the market.

Factors that will restrain market growth are the price pressures, product recalls and high

costs of IVTM systems.

REGIONAL INSIGHTS

North America accounts for the largest share of the market in 2016 and is expected to continue in the near future. This dominance can be attributed to a large number of surgical procedures that are taking place in the region. (US hold the largest share in the patient temperature management market.) Europe has the second largest share of market due to the development of new products.

Asia Pacific Market is likely to grow during 2017-2025 with number of market players expanding and emerging the business. The driving factors being the awareness and rise in cancer risks and low cost surgeries. The growing government support in New Zealand, Australia, South Korea and Taiwan will boost the market growth of patient temperature management technique.

COMPETITIVE INSIGHTS

The major players in the market include the 3M Company (US), Smiths Group plc (US), Medtronic plc (Covidien plc (Ireland)), Stryker Corporation (US), C. R. Bard, Inc. (US), ZOLL Medical Corporation (US), Geratherm Medical AG (Germany), Inditherm Plc (UK), and Cincinnati Sub-Zero Medical Division (US). Companies are forming alliances and are going for mergers and acquisitions to strengthen their market position.

Organizations are investing in research and development to come up with novel and innovative products that will capture new market share.

Contents

1. RESEARCH SCOPE

- 1.1. STUDY GOALS
- 1.2. SCOPE OF THE MARKET STUDY
- 1.3. STUDY AND FORECASTING YEARS
- 1.4. RESEARCH METHODOLOGY

2. SOURCES OF DATA

- 2.1. PRIMARY SOURCES
- 2.2. SECONDARY SOURCES
- 2.3. MARKET SIZE ESTIMATION
- 2.4. DATA TRIANGULATION
- 2.5. ASSUMPTIONS

3. EXECUTIVE SUMMARY

- 3.1. INTRODUCTION
- 3.2. DEFINITIONS
- 3.3. NORMOTHERMIA
- 3.4. HYPOTHERMIA
- 3.5. HYPERTHERMIA
- 3.6. PATIENT TEMPERATURE MANAGEMENT SYSTEM
- 3.7. ADVANTAGES OF PATIENT TEMPERATURE MANAGEMENT SYSTEMS

4. MARKET OVERVIEW

- 4.1. MARKET DRIVERS
- 4.2. MARKET RESTRAINTS
- 4.3. MARKET OPPORTUNITIES

5. MARKET SEGMENTATION

- 5.1. MARKET BY PRODUCTS
 - 5.1.1. PATIENT WARMING SYSTEMS
 - 5.1.2. CONVECTIVE WARMING SYSTEMS
 - 5.1.3. SURFACE WARMING SYSTEMS

- 5.1.4. INTRAVASCULAR WARMING SYSTEMS
- 5.1.5. PATIENT COOLING SYSTEMS
- 5.1.6. SURFACE COOLING SYSTEMS
- 5.1.7. INTRAVASCULAR COOLING SYSTEMS
- 5.2. MARKET BY APPLICATION AREA
 - 5.2.1. PERIOPERATIVE CARE
 - 5.2.2. NEWBORN CARE
 - 5.2.3. ACUTE CARE
 - 5.2.4. OTHER APPLICATION AREA
- 5.3. MARKET BY END USERS
 - 5.3.1. SURGICAL CENTER
 - 5.3.2. EMERGENCY CARE UNITS
 - 5.3.3. AMBULATORY SITES

6. KEY ANALYTICAL

- 6.1. VALUE CHAIN ANALYSIS
- 6.2. SUPPLY CHAIN ANALYSIS
- 6.3. ACQUISITIONS: KEY GROWTH STRATEGY OF LEADING PLAYERS

7. REGIONAL ANALYSIS

- 7.1. NORTH AMERICA
 - 7.1.1. US
 - 7.1.2. CANADA
- 7.2. EUROPE
 - 7.2.1. GERMANY
 - 7.2.2. UK
 - 7.2.3. FRANCE
 - 7.2.4. ITALY
 - 7.2.5. SPAIN
 - 7.2.6. REST OF EUROPE (ROE)
- 7.3. ASIA-PACIFIC
 - 7.3.1. JAPAN
 - 7.3.2. CHINA
 - 7.3.3. INDIA
 - 7.3.4. REST OF ASIA-PACIFIC (ROAPAC)
- 7.4. REST OF THE WORLD (ROW)
 - 7.4.1. LATIN AMERICA

7.4.2. MIDDLE EAST

7.4.3. AFRICA

8. COMPANY PROFILING

8.1. C. R. BARD, INC.

8.2. CINCINNATI SUB-ZERO PRODUCTS INC.

8.3. GERATHERM MEDICAL AG

8.4. INDITHERM PLC

8.5. MEDTRONIC PLC (COVIDIEN PLC)

8.6. SMITHS MEDICAL (A SUBSIDIARY OF SMITHS GROUP PLC)

8.7. STRYKER CORPORATION

8.8. THE 3M COMPANY

8.9. ZOLL MEDICAL CORPORATION

LIST OF TABLE

1. GLOBAL PATIENT TEMPERATURE MANAGEMENT MARKET BY PRODUCTS, 2017-2025, (IN \$BILLIONS)

2. GLOBAL PATIENT WARMING SYSTEMS MARKET BY REGION, 2017-2025, (IN \$BILLIONS)

3. GLOBAL CONVECTIVE WARMING SYSTEMS MARKET BY REGION, 2017-2025, (IN \$BILLIONS)

4. GLOBAL SURFACE WARMING SYSTEMS MARKET BY REGION, 2017-2025, (IN \$BILLIONS)

5. GLOBAL INTRAVASCULAR WARMING SYSTEMS MARKET BY REGION, 2017-2025, (IN \$BILLIONS)

6. GLOBAL PATIENT COOLING SYSTEMS MARKET BY REGION, 2017-2025, (IN \$BILLIONS)

7. GLOBAL SURFACE COOLING SYSTEMS MARKET BY REGION, 2017-2025, (IN \$BILLIONS)

8. GLOBAL INTRAVASCULAR COOLING SYSTEMS MARKET BY REGION,

2017-2025, (IN \$BILLIONS)

9. GLOBAL PATIENT TEMPERATURE SYSTEMS MARKET IN PERIOPERATIVE CARE BY REGION, 2017-2025, (IN \$BILLIONS)

10. GLOBAL PATIENT TEMPERATURE SYSTEMS MARKET IN NEWBORN CARE BY REGION, 2017-2025, (IN \$BILLIONS)

11. GLOBAL PATIENT TEMPERATURE SYSTEMS MARKET IN ACUTE CARE BY REGION, 2017-2025, (IN \$BILLIONS)

12. GLOBAL PATIENT TEMPERATURE SYSTEMS MARKET IN OTHER APPLICATION AREAS BY REGION, 2017-2025, (IN \$BILLIONS)

13. GLOBAL PATIENT TEMPERATURE SYSTEMS MARKET IN SURGICAL CENTERS BY REGION, 2017-2025, (IN \$BILLIONS)

14. GLOBAL PATIENT TEMPERATURE SYSTEMS MARKET IN EMERGENCY CARE UNITS BY REGION, 2017-2025, (IN \$BILLIONS)

15. GLOBAL PATIENT TEMPERATURE SYSTEMS MARKET IN AMBULATORY SITES BY REGION, 2017-2025, (IN \$BILLIONS)

16. NORTH AMERICA PATIENT TEMPERATURE SYSTEMS MARKET BY COUNTRY, 2017-2025, (IN \$BILLIONS)

17. EUROPE PATIENT TEMPERATURE SYSTEMS MARKET BY COUNTRY, 2017-2025, (IN \$BILLIONS)

18. ASIA-PACIFIC PATIENT TEMPERATURE SYSTEMS MARKET BY COUNTRY, 2017-2025, (IN \$BILLIONS)

LIST OF FIGURE

1. MARKET SIZE ESTIMATION

2. DATA TRIANGULATION

3. VALUE CHAIN ANALYSIS

4. SUPPLY CHAIN ANALYSIS

5. US PATIENT TEMPERATURE MANAGEMENT MARKET, 2017-2025 (IN \$BILLIONS)

6. CANADA PATIENT TEMPERATURE MANAGEMENT MARKET, 2017-2025 (IN \$BILLIONS)

7. GERMANY PATIENT TEMPERATURE MANAGEMENT MARKET, 2017-2025 (IN \$BILLIONS)

8. UK PATIENT TEMPERATURE MANAGEMENT MARKET, 2017-2025 (IN \$BILLIONS)

9. FRANCE PATIENT TEMPERATURE MANAGEMENT MARKET, 2017-2025 (IN \$BILLIONS)

10. ITALY PATIENT TEMPERATURE MANAGEMENT MARKET, 2017-2025 (IN \$BILLIONS)

11. SPAIN PATIENT TEMPERATURE MANAGEMENT MARKET, 2017-2025 (IN \$BILLIONS)

12. ROAPAC PATIENT TEMPERATURE MANAGEMENT MARKET, 2017-2025 (\$BILLIONS)

13. JAPAN PATIENT TEMPERATURE MANAGEMENT MARKET, 2017-2025 (\$BILLIONS)

14. CHINA PATIENT TEMPERATURE MANAGEMENT MARKET, 2017-2025 (IN \$BILLIONS)

15. INDIA PATIENT TEMPERATURE MANAGEMENT MARKET, 2017-2025 (\$BILLIONS)

16. ROAPAC PATIENT TEMPERATURE MANAGEMENT MARKET, 2017-2025 (\$BILLIONS)

17. ROW PATIENT TEMPERATURE MANAGEMENT MARKET, 2017-2025 (IN \$BILLIONS)

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